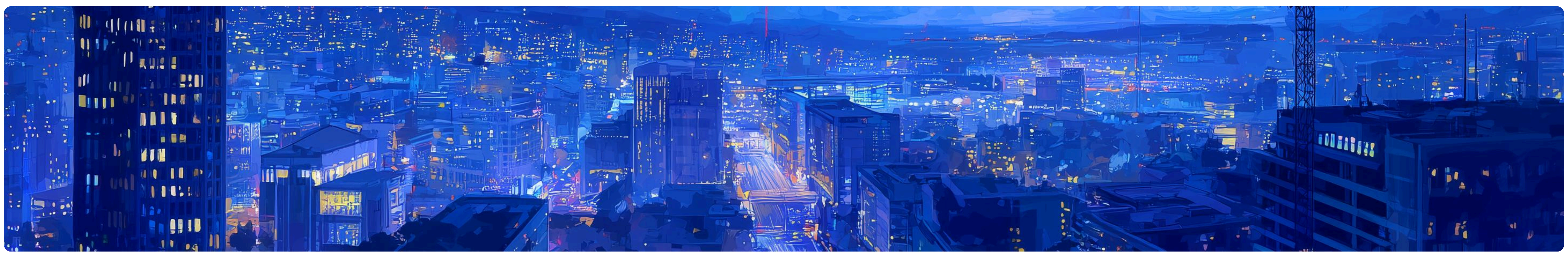
Webinar Leave-Behind

The Compliance Engine Checklist

6 Steps From Tracking COIs To Running Compliance



WHAT TO BUILD	WHY IT MATTERS	HOW TO GET THERE
↗ **Requirements defined once, by risk**	When each reviewer interprets requirements on their own, the same certificate gets different verdicts, and compliance depends on who looked at it.	Set requirements per sub/vendor type, trade, project and risk profile, agree on exceptions internally, and apply the same standard to every review.
↗ **Audit behind the certificate**	A COI proves a document arrived, not that the coverage is real. What actually protects you sits in the endorsements and exclusions behind it.	Collect the actual endorsement forms with every COI, review the schedule of forms for exclusions tied to the trade, and communicate the exact deficiency.
↗ **One place for collection and status**	When compliance lives in inboxes, spreadsheets and shared drives, project leaders can't tell whether a sub is ready to work or what's still outstanding.	Centralize collection, review and deficiency outreach so risk, project and accounting teams see the same status at the same time.
↗ **Proactive renewals**	Compliance drops during peak renewal months. At Manhattan, recovering it manually used to take close to two months, now it takes 2-3 weeks.	Start renewal outreach ahead of expiration. Track mismatched policy dates, so policies renewing in different months don't mean repeat chasing.
↗ **Exceptions and waivers on record**	Not every gap is a stop. But a waiver granted in an email thread can't be found when a claim, an audit or a lender asks why the sub was cleared.	Route every flagged gap to one decision: request a correction or waive it. Record who decided, when and why, in the same place the compliance status lives.
↗ **Compliance connected to payment**	When status is disconnected from operations, noncompliant subs get paid and compliant ones get held up. The process only enforces itself when the decision reaches the workflow.	Sync verified status into your ERP (Manhattan uses Vista) and tie payment and mobilization to it. Manhattan's rule: if the sub's insurance expires, no check is issued.

Want to run compliance the way Manhattan does?

See how Jones turns COI tracking into a compliance engine connected to payment.

Learn More ↗

Get In Touch